# Bonneville Power Administration
# Transmission Business Line

Beta Version

# Customer Web Interface

# Ancillary Services

# User's Guide

# Table of Contents

# 1 Introduction

## The data in the Test Database, which you will use to test the system, may or may not be real or actual data. Test Database material was used in the creation of this User's Guide.

As of October 1, 2001, customers will be able to access Transmission and Demand Schedules and do any or all of the following:

- View all accounts
- Manage their account with BPAT
- Perform multiple queries
- Filter using Source, Sink, TCH, Product, special characters, and day/date
- Submit schedules for Preschedule and Real-Time

## 1.1  Purpose

The purpose of this document is to introduce customers to the Ancillary Services view of the CWI, and to serve as a guide for its use.

## 1.2  Hardware/Software Requirements

- Internet Explorer (IE) 5.0 or higher
- Browser should have Javascript and cookies
- Browser must have SSL enabled (128 bit encryption, which is the default for most IE installations)
- Access to the Internet
- Screen resolution of 1024 x 768 or higher recommended

Note:  Cookies are not persisted across logins and are used only for login and session management.  See http://www.bpa.gov/support/disclaimer.html for BPA's policies.

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## 1.3  URL for CWI

The URL for the Beta test version of CWI is as follows:

http://taim-test.transmission.bpa.gov/taim/

## 1.4  Logins for Test and Demonstration

| Username | Password | Privileges |
|----------|----------|-----------|
| ava01 | ava01 | Read Only |
| ava02 | ava02 | Edit Ability |
| ewb01 | ewb01 | Read Only |
| ewb02 | ewb02 | Edit Ability |
| pac01 | pac01 | Read Only |
| pac02 | pac02 | Edit Ability |
| bc01 | bc01 | Read Only |
| bc02 | bc02 | Edit Ability |
| png01 | png01 | Read Only |
| png02 | png02 | Edit Ability |
| pbl01 | pbl01 | Read Only |
| pbl02 | pbl02 | Edit Ability |

ava = Avista

ewb = Eugene Water and Electric Board

pac = Pacificorp

bc = PowerX

png = Pacific Northwest Generating Cooperative

pbl = Bonneville Power Administration, Power Business Line

| | | |
|----------|----------|-----------|
| tem01 | tem01 | Read Only |
| tem02 | tem02 | Edit Ability |
| tmp01 | tmp01 | Read Only with Impersonate |

**Note:**  These are **Test** user names and passwords for use in the Test database only.  The system will include **all** users in the Production database.  BPA will provide the information you will need to access the system in Production.

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# 2 Access to Ancillary Services on the CWI

When you log on, you automatically go into a system of Secure Sockets Layer (SSL).  Should you attempt to bypass this SSL, the system will redirect you to a new URL that is SSL secured.  Without the 128-bit encryption SSL feature, you are unable to access the display.

When you log in to the system, but do not actively use it for 30 minutes, the system will log you off.  The screen will appear the same as when you left it, but you will not be able to edit or search for data.  Instead, the system takes you back to the Login Window.

Use the following procedures to access Ancillary Services on the CWI.

| Step | Action | Screen Element |
|------|--------|----------------|
| 1 | Direct your web browser to the following URL: **http://taim-test.transmission.bpa.gov/taim/** <br><br> The opening Web Interface screen appears, and is similar to the following. | Address 🔵 http://taim-test.transmission.bpa.gov/taim/i ▾ |

# Web Interface Opening Screen
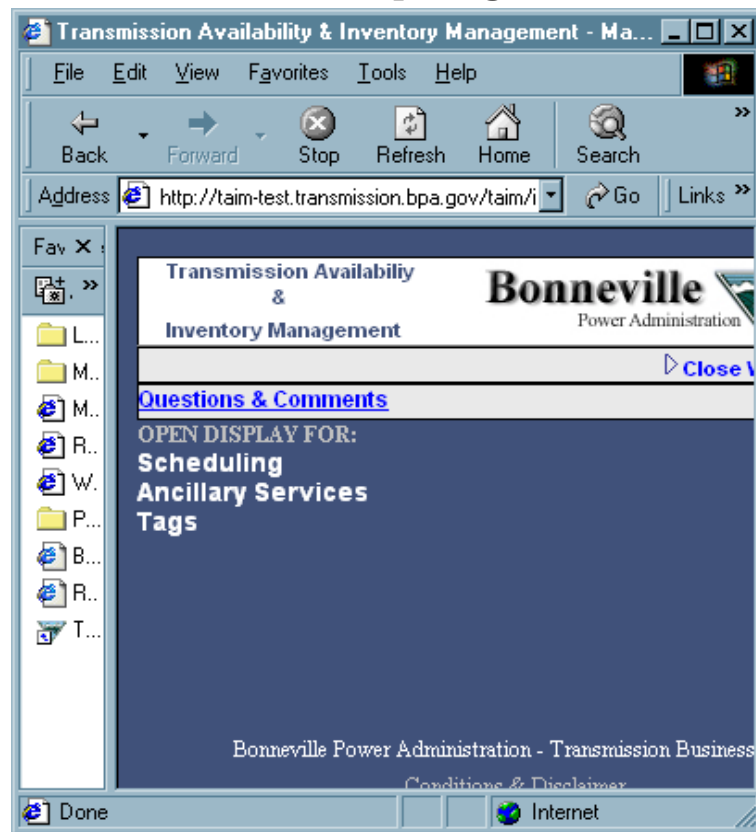


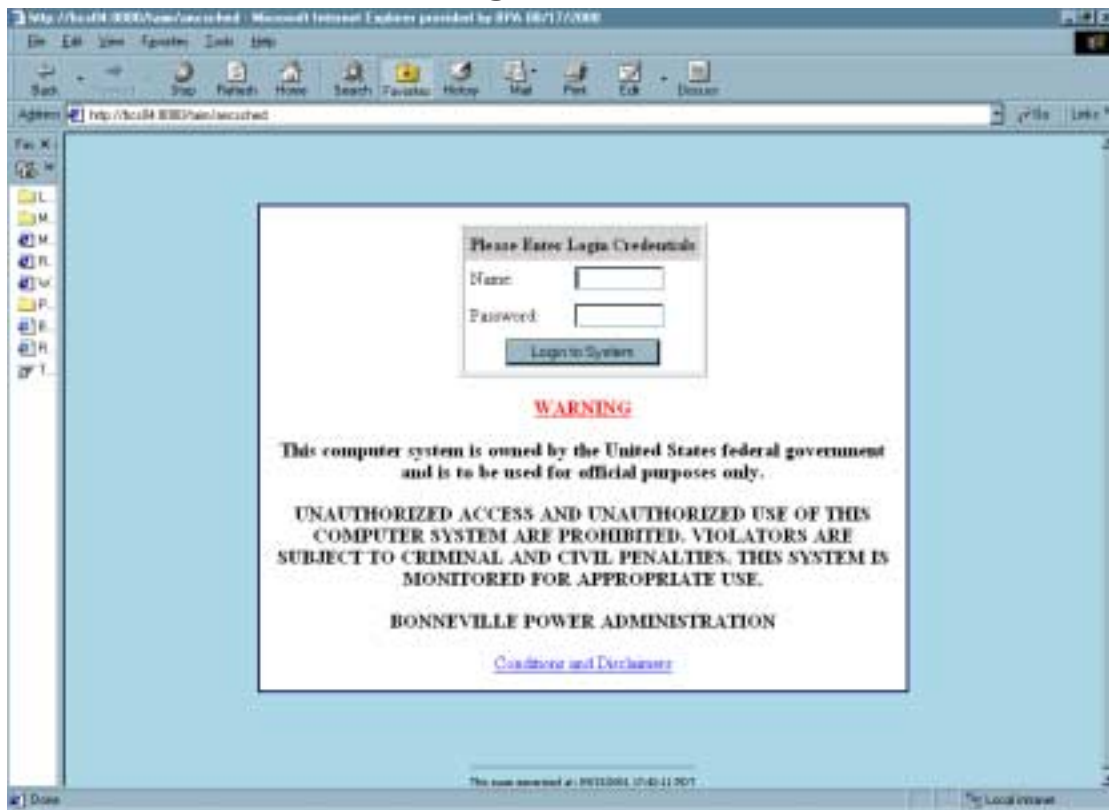| Step | Action | Screen Element |
|------|--------|----------------|
| 2 | Roll your cursor over **Scheduling** and click on **Ancillary Services**. A *Security Alert* window appears and is similar to the following. |  |

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## Security Alert Window
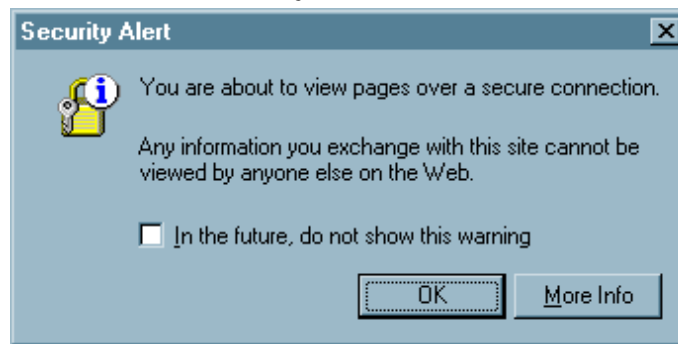


| Step | Action | Screen Element |
|------|--------|----------------|
| 3 | You may want to click in the check box to the left of the message, *In the future, do not show this warning.* | ☑ In the future, do not show this warning |
| 4 | If you have questions about the Security Alert, click on the **More Info** button.  A window similar to the following appears. | More Info |

## Entering a Secure Site
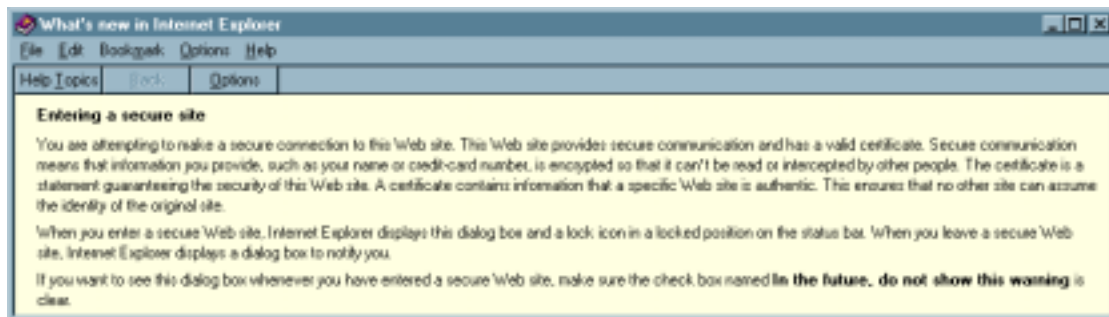


| Step | Action | Screen Element |
|------|--------|----------------|
| 5 | Click on the **x** in the upper right corner to close this window. | ☒ |
| 6 | Click on the **OK** button to close the *Security Alert* window.  The *Login* screen appears, and is similar to the following. | OK |

# Log On Screen



| Step | Action | Screen Element |
|------|--------|----------------|
| 7 | Enter your assigned login *Name* in the *Name* field.  The login name is not case sensitive. | Name:  tem02 |
| 8 | Enter your assigned *Password* in the *Password* field.  The password is not case sensitive. | Password:  ****** |
| 9 | Click on the **Login to System** button.  The *Ancillary Services* screen appears and looks similar to the following. | Login to System |

## Ancillary Services Screen



| Step | Action | Screen Element |
|------|--------|----------------|
| 10 | Note that the screen indicates you have logged in as an *Edit User* representing *TEM.* | Current Logged In User: **Edit User** Representing: **TEM** |
| Note: | When you log in to the system, but do not actively use it for 30 minutes, the system will log you off. The screen appears the same as when you left it, but you are unable to edit or search for data. Instead, the system takes you back to the Login Window. | Please Enter Login Credentials<br>Name:<br>Password:<br>Login to System |

# 3 Use the Contract Holder View Screen

As of 10/1/01, you will be able to manage your account with BPAT using this screen to view all accounts, perform queries and filters, and submit ancillary service information.

You will make your query selections in the upper quarter of the screen. You can enter an account number and day/date, make selections from the pull down menus and day/date, or leave all menus set at <ALL> and select only the day/date. When you enter the account number, the system gives you all of the Ancillary Services data for that account only. Selections made in the pull down menus allow you to define the extent of the information displayed. Selecting <ALL> at all menus gives you all accounts.

**You can access accounts where your company is the TCH-N or the TCH-I.**

You can search for up to five days before the current date, for the current date, and for up to five days past the current date.

In the following exercise, we will find the same account using:

- Account Number
- Components Menus from Load/Generator through Type 5
- All
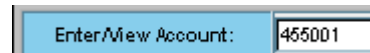
Note that not all Component Menu examples can result in locating the selected account number, since we are looking at various *Load/Generators, Services,* and *Types.*

## 3.1 Filter Using Account Number

The account number gives you all of the Ancillary Services data for that account.

You may need to de-select the *Only Show Accounts With Data* option.
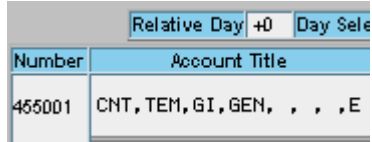
Follow these steps to filter using the account number.

| Step | Action | Screen Element |
|------|--------|----------------|
| 1a | Enter an appropriate account number for your company in the *Enter/View Account* field. In this case, enter **455001**. | Enter/View Account: 455001 |

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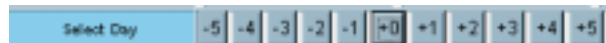| Step | Action | Screen Element |
|---|---|---|
| 1b | Click on **Select Day +0** to select the *day/date.* (Select +0 for today, +1 for tomorrow, -1 for yesterday, etc.)  A screen similar to the following appears. | Select Day -5 -4 -3 -2 -1 +0 +1 +2 +3 +4 +5 |

## Account Number Results Screen
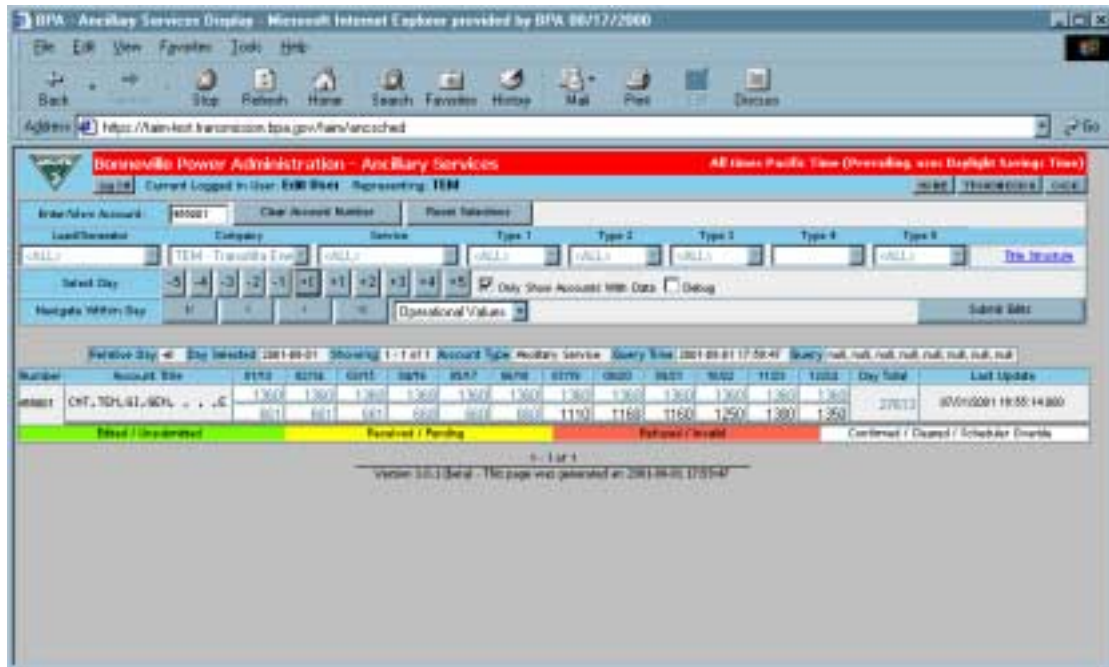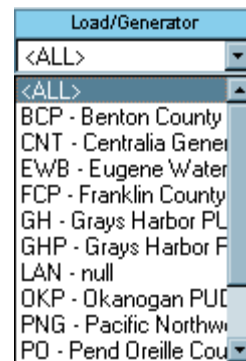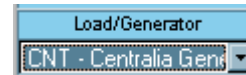


| Step | Action | Screen Element |
|---|---|---|
| 1c | You located *Account Number 455001* using the account number and day. | Relative Day +0 Day Sele / Number Account Title / 455001 CNT,TEM,GI,GEN, , , ,E |
| 1d | Note that all fields, *Load Generator* through *Type 5,* are now gray.  They went gray when you began entering the account number. | |
| 1e | Click on the **Clear Account Number** button in order to proceed. | Clear Account Number |

## 3.2  Filter Using Component Menus

You can filter using the pull down menus for *Load/Generator, Service*, and *Type 1* through *Type 5*.  The *Company* pull down menu will reflect the company of the authorized customer accessing the system.  At this time, the only *Company* is *TEM*. At this time, there are limited accounts in the database.

### 3.2.1  Filter Using Load/Generator

You can filter using the *Load/Generator* pull down menu, your company, and the *day/date*.

| Step | Action | Screen Element |
|------|--------|----------------|
| 2a | Open the **Load/Generator** pull down menu. | Load/Generator<br>&lt;ALL&gt;<br>&lt;ALL&gt;<br>BCP - Benton County<br>CNT - Centralia Gener<br>EWB - Eugene Water<br>FCP - Franklin County<br>GH - Grays Harbor PL<br>GHP - Grays Harbor F<br>LAN - null<br>OKP - Okanogan PUD<br>PNG - Pacific Northwe<br>PO - Pend Oreille Cou |
| 2b | Select **CNT**. | Load/Generator<br>CNT - Centralia Gene |
| 2c | Select the day/date.  In this case, **+0**.  All CNT contracts for TEM display on a screen similar to the following. | Select Day   -5  -4  -3  -2  -1  +0  +1  +2  +3  +4  +5 |
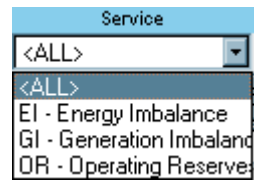
# CNT as Load/Generator Results Screen



| Step | Action | Screen Element |
|------|--------|----------------|
| 2d | You located account number **455001** using the *Load/Generator* pull down menu and the *day/date*. | 455001  CNT,TEM,GI,GEN, , , ,E |
| 2e | Click on **Reset Selections** to proceed. | Reset Selections |

### 3.2.2 Filter Using Service
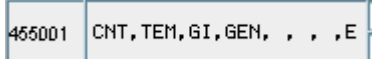
You can filter using the *Service* pull down menu, your company, and the *day/date*.

| Step | Action | Screen Element |
|------|--------|----------------|
| 3a | Open the **Service** pull down menu. | |
| 3b | Select **GI – Generation Imbalance**, in this case. | |
| 3c | Select the day/date.  In this case, **+0**.  All Generation Imbalance contracts for TEM display on a screen similar to the following. | |

**Service** - **Generation Imbalance** - **Results Screen**

| Step | Action | Screen Element |
|---|---|---|
| 3d | You located account number **455001** using the *Service (GI – Generation Imbalance)* pull down menu and the *day/date*.<br><br>Selecting a different service will provide different results.  With the current limited database, further *Service* demonstrations are not possible. | 455001  CNT,TEM,GI,GEN, , , ,E |
| 3e | Click on **Reset Selections** to proceed. | Reset Selections |

### 3.2.3  Filter Using Type 1

You can filter using the *Type 1* pull down menu, your company, and the *day/date*.

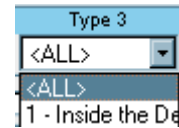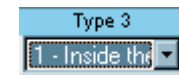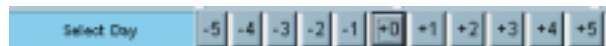| Step | Action | Screen Element |
|---|---|---|
| 4a | Open the **Type 1** pull down menu. | Type 1<br><ALL><br><ALL><br>GEN - Generatic<br>GVC - Generatic<br>LOD - Load<br>OBG - Obligation<br>PB - Payback<br>SP - Self Supply |
| 4b | Select **GEN** in this case. | Type 1<br>GEN - Gene |
| 4c | Select the day/date.  In this case, **+0**.  All *Type 1 - GEN* contracts for TEM display on a screen similar to the following. | Select Day  -5 -4 -3 -2 -1 +0 +1 +2 +3 +4 +5 |

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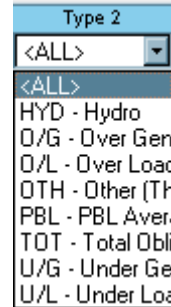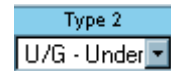
## Type 1 – GEN – Results Screen



| Step | Action | Screen Element |
|------|--------|----------------|
| 4d | You located account number **455001** using the *Service (GI – Generation Imbalance)* pull down menu and the *day/date*.<br><br>Selecting a different service will provide different results.  With the current limited database, further *Type 1* demonstrations are not possible. | 455001  CNT,TEM,GI,GEN, , , ,E |
| 4e | Click on **Reset Selections** to proceed. | Reset Selections |

### 3.2.4  Filter Using Type 2

You can filter using the *Type 2* pull down menu, your company, and the *day/date*.

| Step | Action | Screen Element |
|---|---|---|
| 5a | Open the **Type 2** pull down menu. | Type 2 <ALL> — <ALL> / HYD - Hydro / O/G - Over Gen / O/L - Over Load / OTH - Other (TH / PBL - PBL Aver / TOT - Total Obl / U/G - Under Ge / U/L - Under Loa |
| 5b | Select **U/G** in this case. | Type 2 — U/G - Under |
| 5c | Select the *day/date*. In this case, **+0**. All *Type 2 – U/G* contracts for TEM display on a screen similar to the following. | Select Day  -5 -4 -3 -2 -1 +0 +1 +2 +3 +4 +5 |

## Type 2 – U/G – Results Screen
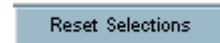


| Step | Action | Screen Element |
|------|--------|----------------|
| 5d | You located all accounts for *Type 2 - UG* and the *day/date*.<br><br>Selecting a different *Type 2* will provide different results.  With the current limited database, further *Type 2* demonstrations are limited. |  |
| 5e | Click on **Reset Selections** to proceed. |  |
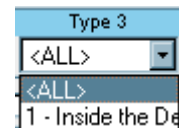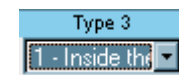
### 3.2.5 Filter Using Type 3 – Nothing in Database for Type 3

| Step | Action | Screen Element |
|------|--------|----------------|
| 6a | Open the **Type 3** pull down menu. | Type 3 <ALL> <ALL> 1 - Inside the De |
| 6b | Select **1 – Inside** in this case. | Type 3 1 - Inside the |
| 6c | Select the *day/date*. In this case, +**0**. All *Type 3, 1 - Inside* contracts for TEM display on a screen similar to the following. | Select Day  -5 -4 -3 -2 -1 +0 +1 +2 +3 +4 +5 |

**Type 3 – 1 Inside – Results Screen**

| Step | Action | Screen Element |
|------|--------|----------------|
| 6d | You located all accounts for *Type 3, 1 – Inside* and the *day/date*. Selecting a different *Type 3*, when available, will provide different results. | |
| 6e | Click on **Reset Selections** to proceed. | Reset Selections |

### 3.2.6 Filter Using Type 4 – Menu is Now Empty

| Step | Action | Screen Element |
|------|--------|----------------|
| 7a | Open the **Type 4** pull down menu. | Type 3 <ALL> <ALL> 1 - Inside the De |
| 7b | Select **???** in this case. | Type 3 1 - Inside the |
| 7c | Select the *day/date*. In this case, +**0**. All *Type 4, ???* contracts for TEM display on a screen similar to the | Select Day  -5 -4 -3 -2 -1 +0 +1 +2 +3 +4 +5 |

| Step | Action | Screen Element |
|------|--------|----------------|
| | following. | |
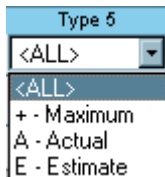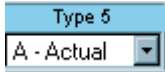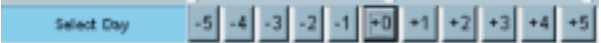
## Type 4 – ??? – Results Screen

| Step | Action | Screen Element |
|------|--------|----------------|
| 7d | You located all accounts for *Type 4, ???* and the *day/date*.<br><br>Selecting a different *Type 4*, when available, will provide different results. | |
| 7e | Click on **Reset Selections** to proceed. | Reset Selections |

### 3.2.7  Filter Using Type 5

You can filter using the *Type 5* pull down menu, your company, and the *day/date*.

| Step | Action | Screen Element |
|------|--------|----------------|
| 8a | Open the **Type 5** pull down menu. | Type 5<br><ALL><br><ALL><br>+ - Maximum<br>A - Actual<br>E - Estimate |
| 8b | Select **A** - **Actual** in this case. | Type 5<br>A - Actual |
| 8c | Select the *day/date*.  In this case, +**0**. All *Type 5 – A - Actual* contracts for TEM display on a screen similar to the following. | Select Day   -5 -4 -3 -2 -1 +0 +1 +2 +3 +4 +5 |

# Type 5 – A - Actual – Results Screen



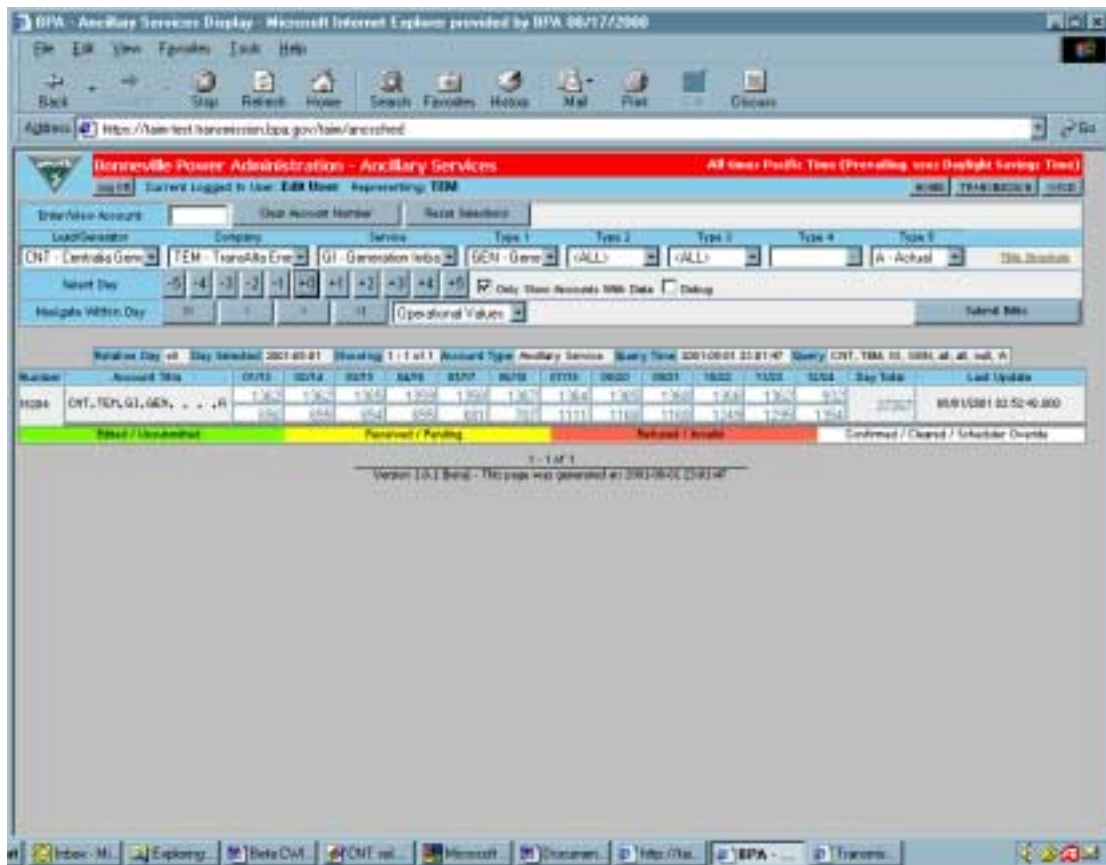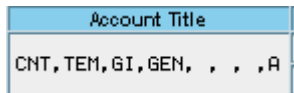| Step | Action | Screen Element |
|------|--------|----------------|
| 8d | You located all accounts for *Type 5, A - Actual* and the *day/date*.<br><br>Selecting a different *Type 5* will provide different results. |  |
| 8e | Click on **Reset Selections** to proceed. |  |

### 3.2.8   Filter Using a Combination of Components

You can filter using a combination of **Load/Generator,** and/or **Service,** and/or one or more **Types** at one time.  The following exercise demonstrates combining **Load/Generator, Service, Type 1** and **Type 5**.

| Step | Action | Screen Element |
|------|--------|----------------|
| 9a | Open the **Load/Generator** menu. | |
| 9b | Select **CNT** in this case. | |
| 9c | Open the **Service** menu. | |
| 9d | Select **GI – Generation Imbalance** in this case. | |
| 9e | Open the **Type 1** menu. | |
| 9f | Select **GEN** in this case. | |
| 9g | Open the **Type 5** menu. | |

| Step | Action | Screen Element |
|------|--------|----------------|
| 9h | Select **A – Actual** in this case. | Type 5 / A - Actual |
| 9i | Click on the *day/date.* In this case, click on **+0**. A screen similar to the following appears. | Select Day  -5 -4 -3 -2 -1 +0 +1 +2 +3 +4 +5 |

**Selected Components Results Screen**



| Step | Action | Screen Element |
|------|--------|----------------|
| 9j | Note the *Account Title* consists of the applicable *Load/Generator, Company, Service, Type 1,* and *Type 5.* Dots indicate the space for *Types 2, 3,* and *4.* | Account Title / CNT,TEM,GI,GEN, , , ,A |
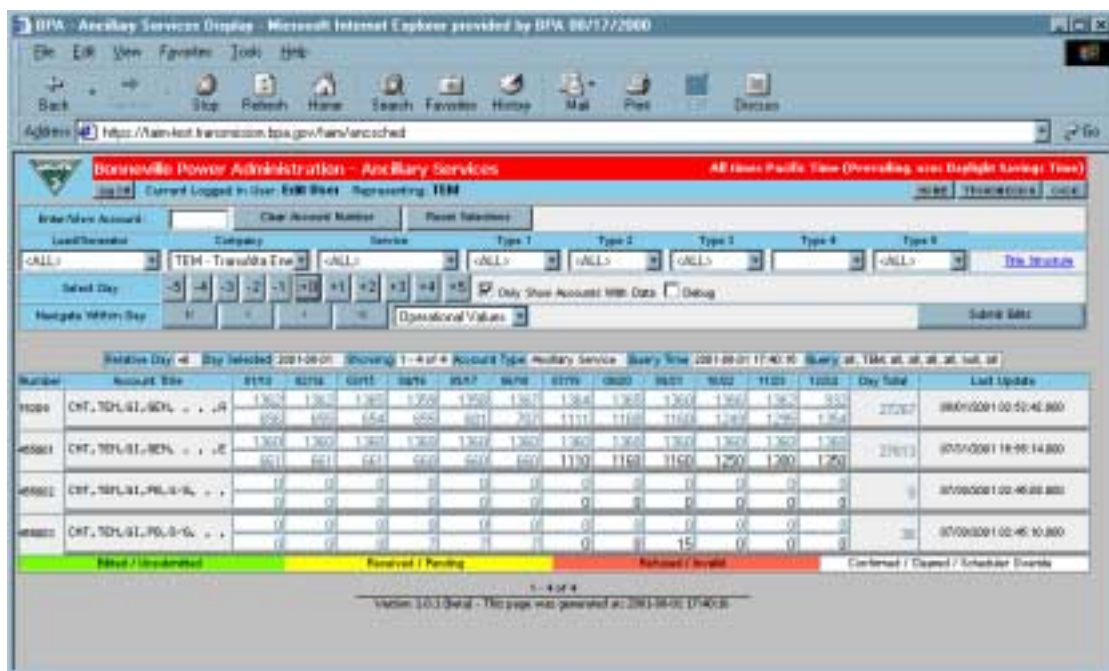
## 3.3  Filter Using <ALL>

When you use the default <ALL> at each common data menu, the system lists all accounts.  This may give you more information than you want or need.

You may need to de-select the *Only Show Accounts With Data* option.

| Step | Action | Screen Element |
|------|--------|----------------|
| 10a | Leave all common data menu options at the default, <**All**>. |  |
| 10b | Click on **Select Day +0**, in this case, to select the *day/date*. |  |
| 10c | Click on > at *Page Forward / Back* until you find account number *455001.*  The screen is similar to the following. |  |

### <ALL> and Date Selected Screen
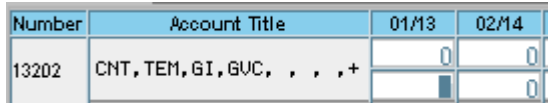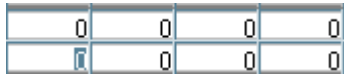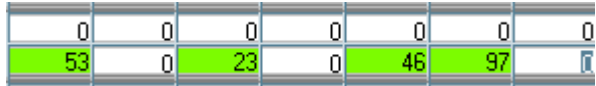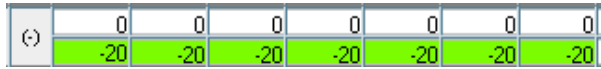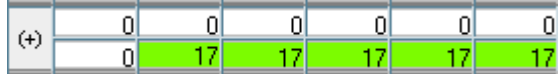


| Step | Action | Screen Element |
|------|--------|----------------|
| 10d | You located *455001* using <**All**>. |  |

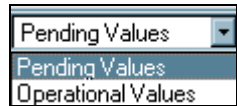| Step | Action | Screen Element |
|------|--------|----------------|
| 10e | Click on the **Reset Selections** button to proceed. | Reset Selections |

# 4 Editing Schedules

You can edit a MW value in the hourly fields if the values currently there are in black. You cannot edit fields with blue values.

| Step | Action | Screen Element |
|------|--------|----------------|
| 1 | In the MWLevel field for hour 02, there is a blue rectangle. This is what you see when you try to enter a new value in a field with blue values. | |
| 2 | You can edit a MW value in the hourly fields only if the current values are black. When you click in a field, a blue rectangle appears, but the current number is still visible. | |
| 3 | You can type the appropriate numbers individually in any field with black numbers. When you click in another field, or press the **Tab** or **Enter** key on your keyboard, the field with the new value entered turns green. This indicates that you have edited the field, but have not submitted it yet (*Edited/Unsubmitted).* | |
| 4 | There is a shortcut for entering the same number in multiple consecutive fields. Type the value, an asterisk, and the number of fields where you want this value entered. In this case, type **20\*7** for entering *20 MW for 7* consecutive hours. | |

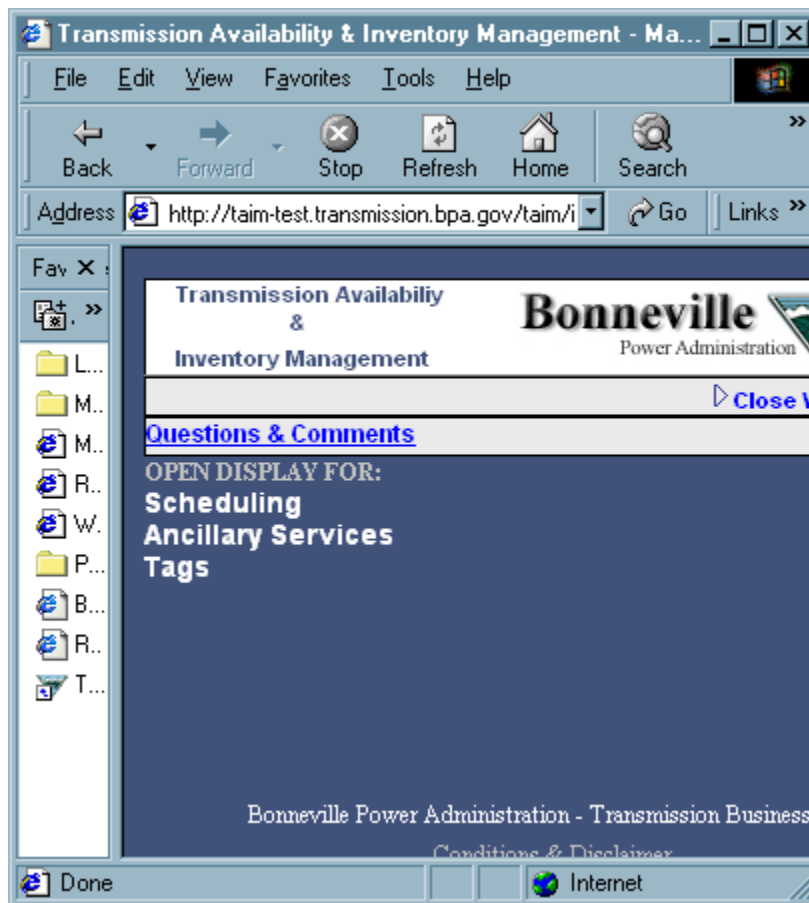| Step | Action | Screen Element |
|------|--------|----------------|
| 5 | Press the **Tab** or the **Enter** key on your *keyboard*. The background for the seven consecutive fields is now green.<br><br>Note that the system added a – sign in front of each value, since this is a – account. The system corrects your entry according to the +/- in the *Sign* column. This is a time saver, since you will not need to enter the – sign. |  |
| 6 | Enter **17*5** in a field with a black number, press **Enter** or **Tab** on your *keyboard*, and get these results.<br><br>If you log out of the system with fields whose backgrounds are green, you lose your edits. |  |
| 7 | Click on the **Submit Edits** button. The green fields turn yellow to indicate they are now *Pending*. |  |

## Submitted Values

| Step | Action | Screen Element |
|------|--------|----------------|
| 11 | *Pending* values display when you select the **Pending** Values option, and *Operational* values display when you select **Operational** Values. |  |

# 5 Other Features of the Contract Holder View Screen

There are useful features on the Contract Holder View screen other than those already covered.

| Action | Screen Element |
|---|---|
| Click on the **Log Off** button to log off the system. | Log Off |
| View the bar to the right of the *Log Off* button to verify your log on status. | Current Logged In User: **Edit User** Representing: **PAC** |
| Click on the **Home** button on the same line, on the far right.  It takes you to the *Home* screen, which is similar to the following. | HOME |
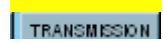
## Home Screen



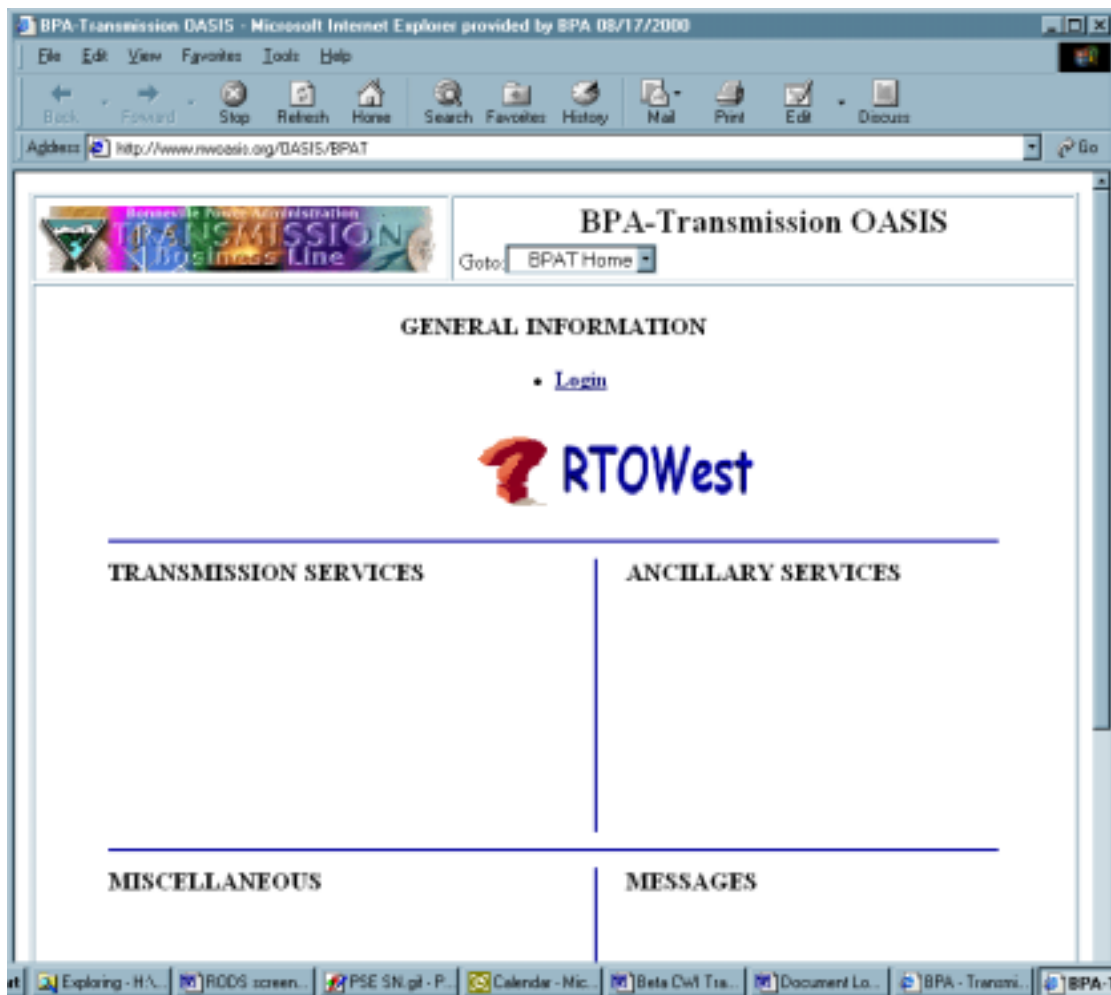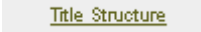| Action | Screen Element |
|---|---|
| Click on the **Transmission** button to go to the *Transmission Scheduling Display* screen. Note the *Transmission* button becomes the *Ancillaries* button. | TRANSMISSION<br><br>ANCILLARIES |

## Transmission Scheduling Display

At this time, you cannot access the Transmission Scheduling Display using this button.

| Action | Screen Element |
|---|---|
| You can click on the **Log Off** or the **Transmission** button to leave the *Ancillary Services* Display screen. | Log Off<br><br>TRANSMISSION |

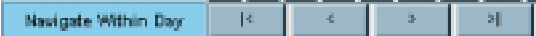| Action | Screen Element |
|---|---|
| Either method will take you to a *Log On* window.  The system requires, at this time, that you log back in when you return to the *Transmission* display by way of the *Transmission* button. | Please Enter Login Credentials<br>Name: [        ]<br>Password: [        ]<br>Login to System |
| You can click on the **Ancillaries** button to open the *Ancillary Services Display* screen, and minimize it to keep it available. | [ _ ] |
| Click on the **OASIS** button to go to the OASIS screen, which is similar to the following. | OASIS |
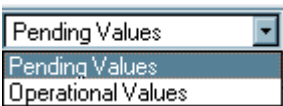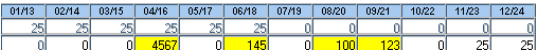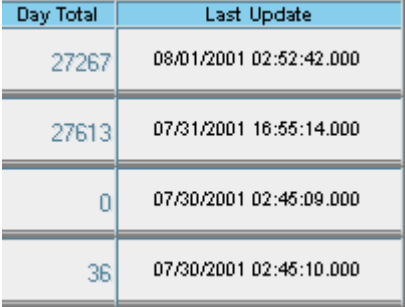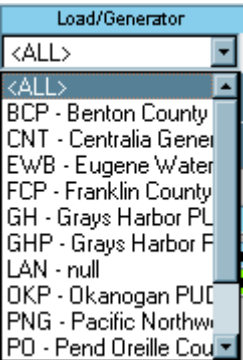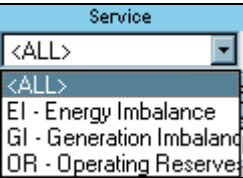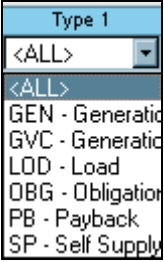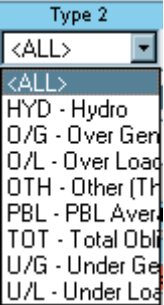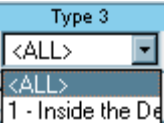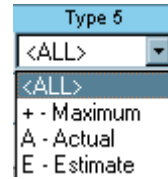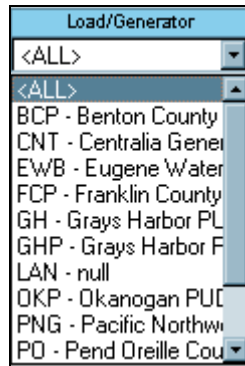
# OASIS Screen

| Action | Screen Element |
|---|---|
| Click on the **Title Structure** hyperlink, below the *HOME* and *OASIS* buttons, for information about the structure of BPA's account titles. A screen appears that is similar to the following. | Title Structure |

### Title Structure Screen

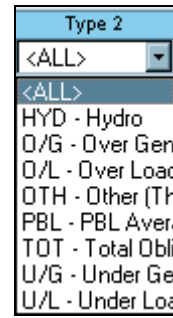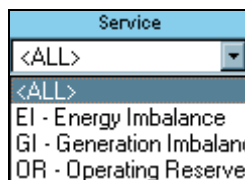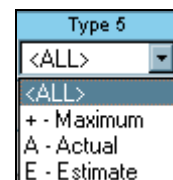| Action | Screen Element |
|---|---|
| Use the **Navigate Within Day** buttons to display additional accounts when choices from the drop down menus resulted in more than 10 accounts. | Navigate Within Day  \|<  <  >  >\| |
| Use this button to go to the first subset of 10 accounts. | \|< |
| Use this button to go to the last subset of 10 accounts. | >\| |
| Use this button to go to the next lower subset of 10 accounts. | < |
| Use this button to go to the next higher subset of 10 accounts. | > |
| Open this pull down menu to select *Pending Values* or *Operational Values*. | Pending Values ▼ / Pending Values / Operational Values |
| You can edit schedules and submit the edits on this screen. Use the **Submit Schedule Edits** button to submit your edits. | Submit Edits |
| Use your **Tab** key, or click in the next field, to go from hour to hour on the screen. | 01/13 02/14 03/15 04/16 05/17 06/18 07/19 08/20 09/21 10/22 11/23 12/24 / 25 25 25 25 25 25 0 0 0 0 0 0 / 0 0 0 4567 0 145 0 100 123 0 25 25 |
| Note the **Day Total** and **Last Update** fields for each account. | Day Total / Last Update / 27267 08/01/2001 02:52:42.000 / 27613 07/31/2001 16:55:14.000 / 0 07/30/2001 02:45:09.000 / 36 07/30/2001 02:45:10.000 |

| Action | Screen Element |
|---|---|
| You can filter using the **Load/Generator** pull down menu. |  |
| You can filter using the **Service** pull down menu. |  |
| You can filter using the **Type 1** pull down menu. |  |
| You can filter using the **Type 2** pull down menu. |  |
| You can filter using the **Type 3** pull down menu. |  |
| You can filter using the **Type 4** pull down menu. | TYPE 4 IS NOW BLANK |

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| Action | Screen Element |
|---|---|
| You can filter using the **Type 5** pull down menu. |  |
| You can filter using a combination of **Load/Generator,** and/or **Service,** and/or one or more **Types** at one time. |  |